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**ALBERTA ECONOMIC DEVELOPMENT AND TOURISM**

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MAR 14 1995

**TOUR OPERATOR  
MARKET  
FOR  
ALBERTA  
ECOTOURISM EXPERIENCES**

**HLA CONSULTANTS  
MARCH 1994**



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TO WHOM IT MAY CONCERN:

Alberta Economic Development and Tourism is pleased to release this study titled: "Tour Operator Market For Alberta Ecotourism Experiences".

Travel to areas of outstanding natural beauty and unique ecological significance has been identified as an important tourism trend. Ecotourism has grown significantly in the last few years, and is the fastest growing segment of the tourism market. Despite this rapid interest, there is very little information or understanding of market demand for ecotourism. Alberta Economic Development and Tourism commissioned this study of North American tour operators to Alberta, who offer specialty and motorcoach tours related to ecotourism, in order to obtain market and product information.

Alberta Economic Development and Tourism is interested in furthering information flow and discussion on the topic of ecotourism and appropriate product development. If you have any comments relative to this report or regarding ecotourism, please contact:

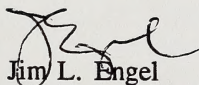
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It should be noted that this study was conducted by an independent consultant commissioned by Alberta Economic Development and Tourism. As such, this study does not represent government policy nor does it imply any commitment to implementation at this time.

Yours sincerely,



Jim L. Engel  
Assistant Deputy Minister  
Small Business and Tourism Development

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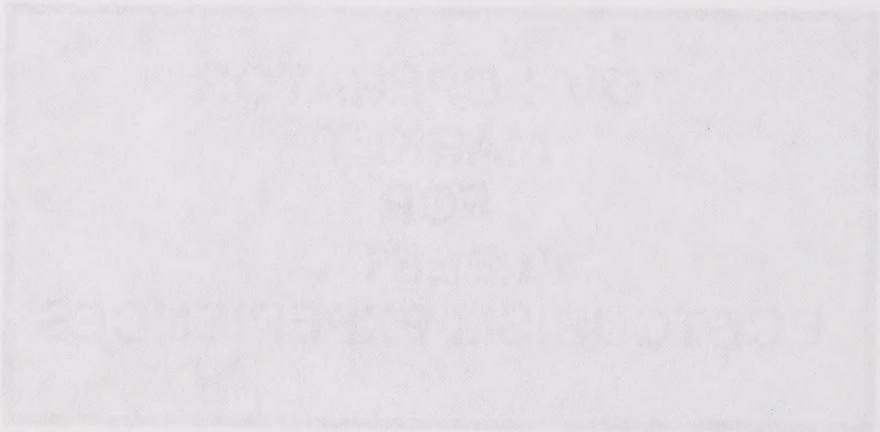
# **ALBERTA ECONOMIC DEVELOPMENT AND TOURISM**

## **TOUR OPERATOR MARKET FOR ALBERTA ECOTOURISM EXPERIENCES**

**HLA CONSULTANTS  
MARCH 1994**

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HLA Consultants

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## **SUMMARY**

### **Background and Methods**

Alberta Economic Development and Tourism, recognizing that ecotourism is one of the fastest growing niches of tourism, initiated this study to obtain market and product information from motorcoach tour operators and specialty tour operators. The focus was on contacting firms who offer, or appear to offer, ecotourism related products, and who identify Alberta as one of their destinations.

Of 57 tour operators, throughout North America, who were sent the survey, 35 completed the interview in its entirety and the other 22, ten of whom are not, or are no longer, doing tours in Alberta, provided some degree of information.

The information request was initially faxed to all firms. Within one week a telephone call was made to obtain the information. The interviews involved detailed conversations.

### **Findings**

- Even though most of the operators interviewed offered Alberta tourism experiences, many did not have a broad appreciation of Alberta tourism products, let alone ecotourism products. Without this knowledge, it will be difficult for them to extend their products in Alberta and effectively provide their clients with Alberta ecotourism products.
- The main products that the operators provide include:
  - visiting the rockies;
  - sightseeing/nature viewing;
  - visiting parks;
  - hiking;
  - water related activities; and
  - camping.
- Operators identify that their specific product components change very rapidly. This is likely in response to rapidly emerging markets, and to many new ecotourism products springing up and becoming identified.
- Market characteristics varied considerably:
  - motorcoach operators tend to cater to a primarily older (retired) market located in the region in which the operator is based; and
  - specialty tour operators serve a broader range of ages and levels of fitness. The origin of their clients is global.

- Scenic outdoor destination was most frequently identified by operators as an attribute of high appeal to the markets who are interested in ecotourism experiences.
- Preferred accommodation types vary considerably based on experiences provided, and clientele. Motorcoach operators generally prefer mid-range accommodation. Specialty operators had varied preferences but were more likely, compared to tour operators, to specify "deluxe" than were motorcoach operators.
- The use of guides, need for guides, and having well trained and knowledgeable guides they can access is an area of importance and concern to many operators coming into the province.
- Most operators require only low to moderate levels of fitness for the activities they require of their guests (walking is the major activity). More demanding levels of fitness are required for certain very specialized products. The "soft" area of ecotourism appears to have considerable potential.
- Most of the experiences provided in Alberta centre on the mountain parks in the south, the Rockies, and Calgary. Edmonton, Jasper, and other areas to the north and east are identified much less. As indicated, lack of awareness of opportunities is a big factor.
- Most trips are of shorter duration (2 to 5 days) and occur in the period from May to October.

## **Recommendations**

- It is recommended that Alberta prepare an information package, for distribution to operators, that describes Alberta ecotourism related opportunities in all parts of the province. This index of available services, if screened for quality control, would be of great benefit to inbound operators, to Alberta based service providers, and to tourists. In addition to often being identified in this survey as needed, the preparation of this type of index is often identified by Alberta based operators as a service that would greatly assist them.
- The operators identify major activities of interest to markets when pursuing this type of tourism experience. An awareness of these interests should be facilitated in order that they be reflected in product development and promotion.



- Because specific product components, offered by operators, will change frequently, it is important to develop, list, and promote a variety of products. They can stand alone or be a component of a package, such that operators can pick and chose and customize as they wish.
- Because winter ecotourists tend to be younger, this demographic characteristic should be considered when developing and marketing winter ecotourism products.
- It is important for Alberta operators and government to promote the varied and unique natural features of Alberta as part of the ecotourism experiences. This will also serve to create an awareness of Alberta outside the mountain park areas.
- Alberta might consider exploring the availability of step on guiding services and guide training for tours in Alberta. If well trained and certified guides were readily available, this could be promoted and serve to attract operators to Alberta.





## **1.0 INTRODUCTION**

### **1.1 Background**

Alberta Economic Development and Tourism has long recognized that ecotourism is one of the fastest growing niches of tourism. They have initiated a variety of related studies that dealt primarily with the supply end. They recognize that there is very little market information related to ecotourism globally, let alone Alberta ecotourism experience demand. This type of market information is considered essential to assist product development or enhancement, and for marketing. Tour operators continue to express a need for well founded market information.

Recognizing the need for market information which specifically addresses Alberta ecotourism markets and experiences, HLA Consultants were retained to conduct this study of specialty tour operators.<sup>1</sup>

The scope of this project was to contact 50 tour operators in North America and do an analysis of their responses, to be completed between mid-February and the end of March 1994.

### **1.2 Study Objectives**

The purpose of the study was to determine the current and emerging tour and specialty tour operator market demand, and related characteristics for ecotourism in Alberta. More specifically the study was to:

1. identify and present characteristics of those specialty tour operations which visit Alberta, and which currently offer ecotourism and related opportunities, as well as those who would be interested in providing those experiences in the future; and
2. provide information related to product characteristics required or preferred by such operations in order to provide direction to government and industry for product development, as well as appropriate industry linkages.

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<sup>1</sup> The work involved followed on similar work that had previously been done by HLA Consultants in the spring and summer of 1993 for Ducks Unlimited Canada to assist in planning a "Ducks Unlimited Canada Nature Watch Program". A portion of this assignment involved a fax telephone survey of motorcoach tour operators throughout North America to identify their potential interest in the Ducks Unlimited Canada Nature Watch Program.

### **1.3 Study Methods**

#### **1.3.1 Survey Design**

A simple one page information request, with accompanying letter, was prepared with assistance from the client. The letter was intended to briefly explain the survey purpose, with a focus on how this information would benefit their industry (see Appendix A: Information Request).

The information request was short and contained on one page, specifying eight information items (see Appendix A). It was sent by Fax, and advised they would be phoned very shortly (2-3 days) for their responses.

The sample was comprised of two groups of tour operators; a small group (20) of tour operators selected from the NTA Data Base, and a larger number of specialty tour operators (36).

#### **1.3.2 NTA Data Base and Respondent Selection Criteria**

The National Tour Association (NTA), based in Kentucky, is the major organization in North America that represents both Canadian and American tour operators. There are two NTA membership options; one is as a full member, the other is as a supplier of services to members and other suppliers. Most major tour operators are listed as full members. The most recent data base (1994) lists approximately 600 full members.

The NTA maintains an active computer data base on its tour operators. This data base provides considerable information, volunteered by each firm. It is possible to program the data base such that firms meeting specific selection criteria are selected from the full membership (e.g. one criterion might be all firms who have Alberta as a destination). To identify firms to be contacted for this survey specific selection criteria were applied to the data base. A search was then done of the firms on the NTA data base that met the specified criteria. The criteria selected to identify firms were:

1. all firms having Alberta as a destination;
2. all firms who are prepared to pay a commission;



3. all firms indicating they cooperate with other operators<sup>2</sup>; and
4. firms indicating they provide the following types of tours:<sup>3</sup>
  - customized group itineraries
  - outdoor/recreation/adventure
  - study/continuing education
  - ethnic
  - themed/special interest

All of the above criteria were specified with an "and" rather than an "or" condition. This means the firms require all, not just one, of the criteria to be selected.

Screening the data base for the above criteria provided the following:

- approximately 321 of the approximate 576 firms on the NTA data base indicate Alberta as one of their destinations;
- approximately 450 firms indicate they are willing to pay a commission;
- approximately 390 firms indicate they are willing to cooperate with other operators; and
- when all of the criteria are combined there are 20 firms from the total NTA data base, that are selected. These are the NTA data base firms to whom the fax information request was sent.

### **1.3.3 Selection of Specialty Operators**

It was decided that the sample of target firms should also include specialty tour operators who come to Alberta, or are in Alberta, and offer or have an interest in

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<sup>2</sup>. This refers to firms indicating they are willing to work (contract) with other operators for provision of certain services they chose to not provide themselves (e.g. guides). This was selected as a criterion because of the beneficial impact this has on Alberta based firms, through their contracting services to out of province operators.

<sup>3</sup>. When providing information to the data base, firms are given choices (17) to specify the types of tour programs they offer. We selected only those firms that each identified all five of the tour programs mentioned below. The decision was based on the assumption that firms specifying all five criteria were likelier to offer ecotourism related experiences.

offering specialty experiences related to ecotourism. These firms were selected from a variety of sources that include the following:

1. the consultant's and client's knowledge of firms in the industry;
2. business card listing of wholesalers and other operators who have attended major trade shows in Canada, such as "Rendezvous Canada"; and
3. firms listed in "Specialty Travel Index", Directory of Special Interest Travel, Issue 28, Spring Summer 1994, San Anselmo, California.

A total of 37 fax information requests were sent to this group of firms.

#### **1.3.4 Survey Response and Sample Representation**

From the total of 57 information requests that were sent (see Appendix B: List of Sample Firms), a total of 35 interviews were completed in full (this refers to firms who responded to all of the questions in the information request). Surveys took approximately 30 minutes to complete in full. The other 22 firms who were faxed the information request were also contacted by telephone. The following is a summary of their status:

- 10 not doing tours in AB; ever or any more;
- 1 business is less than one year old and had no information;
- 1 refused, to protest provincial license barriers;
- 1 wanted to be paid to complete the survey;
- 2 too busy to take the time;
- 1 language barrier (oriental);
- 3 phone out of service;
- 2 no answer at any time; and
- 1 merged with another operator who was interviewed.

As much relevant information as possible was obtained from these 22 firms. All information is summarized in the report and presented in more detail in Appendix C: Detailed Survey Responses.

The complete responses for 35 of 57 firms, who had information to provide relative to their experiences with, or interest in, ecotourism related products in Alberta, is considered to be good. While the sample was deliberately selected to represent a variety of operators, it was not designed to be a statistically representative sample (i.e. the results do not represent the entire industry).

The results represent the group of firms who were interviewed, and may be indicative of what the results would be if a larger statistically structured sample were interviewed.



## 2.0 SURVEY FINDINGS

The survey findings are detailed in Appendix C. The presentation in this chapter is a summary, presented by question topic, and segmented by responses from the sample of motorcoach tour operators and responses from specialty tour operators. Although the presentation is segmented by sample type, to make an analysis of information more homogenous, it is apparent that the operators from the NTA motorcoach sample and the specialty tour sample often have significant common characteristics. Where appropriate, a summary of combined responses from the two samples is presented. Responses from those who did not complete the information request in full, for the reasons mentioned above, are presented at the back of Appendix C: Detailed Survey Responses.

The focus of the report is not on providing recommendations for action, rather it is on providing information that will be of assistance to government and industry in planning. However, recommendations, for consideration, are occasionally presented. When this occurs, they are highlighted in bold capitalized text.

### 2.1 General Comments

With many operators it was difficult to communicate the type of tourism products about which we were interested in obtaining information, because of significant definition problems with the area of "ecotourism". The information request specified "... area of ecotourism (tourism related to culture, nature, adventure)." Although this served to focus the range of products, many operators still had difficulty with the whole concept (e.g. one operator who provides motorcoach tours considered their offering of a stop at the Columbia Icefields to be an activity that defined their operation as being in the area of "ecotourism", yet no other of their activities appeared related).

Many operators who were not necessarily actively involved in this area of tourism had a general awareness of it and were interested in learning more about it and getting involved, if they could obtain information about it, about the related products Alberta has to offer, and if it was demanded by their clients. In many cases this expression was in the form of, "yes, we are interested, if it will make money, and if we are shown how." **ALBERTA SHOULD CONSIDER PREPARING AN INFORMATION PACKAGE, FOR DISTRIBUTION TO OPERATORS, THAT DESCRIBES ALBERTA ECOTOURISM RELATED OPPORTUNITIES.** This would likely be very effective since there is considerable ignorance about the products Alberta has to offer (even Alberta based operators don't know what is available in Alberta [communication at an Alberta industry workshop]), and many operators expressed a strong wish for information.

## **2.2 Operator Ecotourism Related Products**

Question #1: Describe your company's activities/products in the area of ecotourism (tourism related to culture, nature, adventure).

### **NTA Data Base Operators**

- The product offerings are quite varied and likely reflect the individual characteristics of the operators as well as the interests of their markets, either because that is what is being demanded (market driven) or it is purchased because that is what is being offered (supply driven). The general impression conveyed is that ecotourism is more supply than market driven.
- Commonly mentioned overall product characteristics for this group (N.B.: they were identified as having Alberta as one of their destinations, but Alberta could be en route). The characteristics, identified below, relate to any location, not just Alberta:
  - nature viewing (mentioned 5 times) <sup>4</sup>
  - visiting parks (3)
  - short trips preferred, longer trips are not selling well (3)
  - Alaska (3)
  - change packages yearly to incorporate areas of interest (4). This may be a reflection of the rapidly emerging demand for these types of tourism experiences.
  - South America as a destination is popular (2)
  - mountain experiences (2)
  - require expert guides (2)
- Travel destinations are very spread throughout North and South America.

### **Specialty Tour Operators**

- Their travel destinations are very much spread throughout the Americas. Other international destinations are also mentioned, but less frequently.

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<sup>4</sup> The frequency values presented represent the number of firms in the sample who indicate this factor. The numbers will not necessarily equal the sample total since any one operator could specify more than one choice. In addition, in some cases the combined results frequencies are not a direct summation of the two tour types because of differences in how the responses were presented between the groups.

- There are very varied product characteristics because of the varied nature of the operators in the manner of their selection to this sample (to represent a cross-section of operators geographically, but with indications they operate in Alberta, and also in terms of their product interest).
- Product characteristics that were often mentioned include the following:
  - visiting the Rockies (9)
  - visiting parks (5)
  - hiking (7)
  - sightseeing/nature activities (e.g wildlife, northern lights) (6)
  - skiing (3)
  - camping (5)
  - water related activities (5)
  - fishing (3)
  - trail riding (2)
  - cycling (3)

### **Combined Results**

- While a preference for shorter trips was a general concern of motorcoach tour operators, it was not mentioned by specialty tour operators. This is likely a reflection of the nature of the clients and products offered (e.g. motorcoach tour operators likely serve an older clientele, who perhaps often prefer a not so distant product).
- Alaska experiences were mentioned by motorcoach operators, but not so commonly by the specialty group operators, possibly reflecting the "drive through" aspect of motor coach operators.
- Similarly, changing packages yearly was often mentioned by motorcoach operators and not by others. This may be a reflection of a more localized market and the need to change packages to get repeat business.
- The activities that are identified relatively more frequently by both groups are the following (in order of combined frequency):
  - visiting the Rockies (13)
  - sightseeing/nature viewing activities (11)
  - visiting national parks (8)
  - hiking (7)
  - water related activities (5)
  - camping (5)



- **PRODUCT DEVELOPMENT AND PROMOTION SHOULD CONSIDER THE ABOVE AS VERY SIGNIFICANT ACTIVITIES THAT ARE OF APPEAL TO OPERATORS, AND THE MARKETS, WHEN PACKAGES AND EXPERIENCES ARE BEING PLANNED.**

### **2.3 Ecotourism Related Products of Interest to Markets**

Question #2: What types of ecotourism products are your customers interested in (this can be products you offer and/or others you know they are interested in)?

It is more difficult to identify strong (in the sense of more frequent) responses to this question. This may be due to a lack of market information on the part of operators, as well as a feeling of "security" in what they offer now.

Some of the products ideas mentioned by any one firm may not be a product they are now offering. It can be a product offered by other operators and/or a product in which they know their markets have an interest.

#### **NTA Data Base Operators**

- products changes from year to year based on market demand (4)
- not sure (4)
- will plan any trip clients want (2)

#### **Specialty Tour Operators**

- farm vacations/experiences (2)
- heli-hiking (2)
- iceberg watching (2)
- nature/wildlife viewing (5)
- more nature educational products for Japanese students/many Japanese come in groups then return for more specific experiences individually (F.I.T.) (3).
- one operator specifically mentioned they would like to provide a tour of the Alberta Forestry Trunk Road, but there is no accommodation en route.

## **Combined Results**

Most of the results re-enforce the most popular items that were identified in the previous information item. In particular that is:

- Specific product components will change frequently **(THIS SERVES TO EMPHASIZE THE IMPORTANCE OF DEVELOPING, LISTING, AND PROMOTING A VARIETY OF PRODUCTS, THAT STAND ALONE OR CAN BE A COMPONENT OF A PACKAGE, SUCH THAT OPERATORS CAN PICK AND CHOSE AND CUSTOMIZE AS THEY WISH.)**
- Products that relate to experiencing nature (viewing) and going to relatively natural scenic areas are of interest to many and often that interest is expressed by those who do not offer this in their program.
- It is noteworthy that farm vacations/experiences were identified twice, without any prompting.

### **2.4 Client Market Characteristics**

Question #3: Describe the market characteristics of the clients who are interested in these types of tourism activities (ages, occupations, origins, etc.).

#### **NTA Data Base Operators**

The client characteristics with this group of motorcoach tour operators vary very little. They are:

- seniors and retired (11, all but one mentioned this)
- females/widowed (6)
- well travelled (2)
- wealthy/middle class (2)
- most of the client origins are the U.S. (consistent with the sample frame).

It is interesting that one operator identified their client group as wealthy professional people from South America.

### **Specialty Tour Operators**

- In the following, although there are some multiple responses, most operators are expressing the origin of the majority of their clients:
  - Europe (5)
  - Japan (9)
  - Australia/New Zealand (2)
  - United States and Canada (8)
- Many report a considerable age spread from youth to retired (9).
- A generally younger age group (5).
- Retired people (4).
- Winter visitors tend to be younger (3). **THIS IS A CHARACTERISTIC THAT SHOULD BE REVIEWED FOR CONSIDERATION WITH MARKETING WINTER ECOTOURISM PRODUCTS.**
- Office workers (3).
- Single younger women (2).
- Active (3).
- Honeymooners (2).

### **Combined Results**

The identification of market characteristics do not combine well with these two groups because the markets are quite distinctive.

**A PRODUCT-MARKET MATCH EXERCISE IS REQUIRED, SO SPECIFIC PRODUCT CHARACTERISTICS CAN BE ATTACHED TO THE VARIOUS MARKET SEGMENTS. WITH THIS IT WILL BE POSSIBLE TO SEGMENT THE MARKETING TO BE OF MOST APPEAL, THROUGH MATCHING APPROPRIATE PRODUCTS TO MARKETS.**

## **2.5 Package Components With Most Market Appeal**

Question # 4: What are the components of an ecotourism "package" that are of most appeal to your ecotourism markets (i.e. those that will serve as primary attractions to your clients [resources, attractions, developments, activities, etc.]?)

### **NTA Data Base Operators**

Most of the motorcoach tour operator responses to this question were quite varied. Those identified more frequently include:



- attractions at destinations that are scenic and outdoors (5)
- interactive activities/education (3)

### **Specialty Tour Operators**

Responses to this question from specialty operators varied extensively. The most frequently mentioned include the following:

- price/value for dollar of the experience (4)
- the Rocky Mountains (5)
- going to places they had heard of (3)
- areas with beauty/natural features/natural history/ attractiveness/nature/outdoors/wilderness (10)
- good combination of destination and activities (3)
- accommodation/comfort/food (5)

### **Combined Results**

When examining the combined results, the one component of the tour package that stands out as being of most appeal for most of the operators is that of scenic outdoor destinations (16). **IT WILL BE IMPORTANT FOR ALBERTA OPERATORS AND GOVERNMENT TO PROMOTE THE VARIED AND UNIQUE NATURAL FEATURES OF ALBERTA AS PART OF THE ECOTOURISM EXPERIENCES.**

There is a strong attraction to the mountains and to visiting places they have heard of previously.

## **2.6 Product Characteristics That Are Sought**

Question #5: What are the product characteristics that are sought by you and your customers as part of the ecotourism experiences?

- accommodation (types and level)
- related amenities (e.g. food services, educational lectures, etc.)
- programs (interpretive, educational programming)
- guides (need, qualifications)
- physical activities (types and levels)

## **2.6.1 Accommodation and Related Amenities**

### **NTA Data Base Operators**

- Most specify a mid-range (3-star) level of accommodation (7).
- Moderate to deluxe (2).
- Deluxe (1).
- Take what they can get (1).
- All want food services in association with the lodging or very near (12).
- Many specify a requirement for baggage handling (6). With motorcoach operations, this is a major task upon arrival and departure from an overnight location.

### **Specialty Tour Operators**

Specialty tour operators may possibly have more specific accommodation type requirements associated with the type of experience they provide. However, given the relatively small sample size, with few specialty operators of any one type, it is difficult to generalize from their responses. The majority appear to prefer the "middle of the road" (clean, comfortable, 3-star) accommodation. Appendix D presents additional information by type of product offered. A summary of the results follows:

- Many operators expressed a need for a range of accommodation depending on the tour package (8). This could range from budget to deluxe.
- Several expressed a need for deluxe only (6).
- Some expressed a preference for moderate level (4).
- Others preferred cabin style/lodges/B&B (4).
- A restaurant on-site or nearby was a very important amenity to most (16). It was often mentioned that the on-site food service was required for breakfast and box lunches were often used at lunch time.
- Baggage handling is a strong preference for many (12).
- Smoking in restaurants and smoking rooms was often identified (5).

### **Combined Results**

- **THE PREFERRED RANGE OF ACCOMMODATION VARIES VERY EXTENSIVELY AND IS DETERMINED BY THE NATURE OF THE TOUR PACKAGE. PREFERENCE IS EXPRESSED FOR A LARGE RANGE (8), DELUXE (9), MID-RANGE (11), CABIN STYLE/LODGE/B&B (4).**

- Food services, on-site or nearby, were identified as a requirement by the vast majority of operators (28). This is particularly important for breakfast. Good quality food was mentioned several times.
- Baggage handling at the accommodation site is also an important amenity that was mentioned often (18).

## **2.6.2 Programs and Guides**

### **NTA Data Base Operators**

Not all of the responding firms from the NTA Data Base have programs; it depends on the tour, and some may only have interpretation at a destination point. However, several indicate that programs and interpretation are important and part of the tour (4). Specific comments in this area include:

- we use local guides (7)
- it is important for the guides to be recommended or an NTA affiliate (6)
- they describe the requirements of the guides as being personable, well groomed, knowledgeable, informative, and imaginative (7)
- several indicate they use their own guides (3)

### **Specialty Tour Operators**

Many specialty tour operators have their own guides and don't require additional assistance, and/or don't have any formal programs outside of their regular package of experiences. This was identified in approximately 8 cases. Other comments include:

- use step on guides (7)
- guides are required to be knowledgeable and trained (naturalist, first aid, experienced, recommended) (12)
- other language ability was mentioned frequently (6)

### **Combined Results**

- Use of local step on guides is important for many (14).
- The guides that are used (step on or own) must be knowledgeable, trained, and experienced (19).
- Having recommended guides is important (8).



**THE AREA OF: USE OF GUIDES; THE NEED FOR STEP ON GUIDES; AND HAVING WELL TRAINED AND KNOWLEDGABLE GUIDES APPEARS TO BE VERY IMPORTANT TO OPERATORS. ALBERTA MIGHT CONSIDER EXPLORING THE AVAILABILITY OF STEP ON GUIDING SERVICES AND GUIDE TRAINING FOR TOURS IN ALBERTA. IF WELL TRAINED AND CERTIFIED GUIDES WERE READILY AVAILABLE, THIS COULD BE PROMOTED AND SERVE TO ATTRACT OPERATORS TO ALBERTA.**

### **2.6.3 Activity Types and Levels**

#### **NTA Data Base Operators**

- The level of physical activity is primarily low to moderate and involves walking (8).
- Some specify low only (3).
- Two indicate it will vary with the group (2).

This relatively low level of physical activity and emphasis on walking is consistent with motorcoach tours whose clientele is primarily retired.

#### **Specialty Tour Operators**

- There is considerable variance in the types and fitness level requirements for activities identified by the operators. Several identify low levels, involving walking (8).
- Low to medium fitness level (3).
- Moderate fitness level (4).
- Require a full range of fitness, it depends on the group and program (3).
- Moderate to advanced fitness (2).
- Advanced fitness (1).

Specific activities, other than walking, that were identified include: cycling, skiing, rafting, trail riding, canoeing, and hiking.

#### **Combined Results**

- While there is a wide range in the level of fitness levels required for activities, the majority required low to moderate levels involving walking (26). **THE "SOFT" DIMENSION OF ECOTOURISM APPEARS TO HAVE CONSIDERABLE POTENTIAL. THIS RELATES TO A BROADER MARKET HAVING LOWER TO MODERATE LEVELS OF FITNESS.**

- Several indicate that the range will vary depending on the group and program (5).
- Several provide experiences that require higher levels of activity (3).

## **2.7 Experiences and Preferences in Alberta**

Question #6: Discuss your experiences and preferences with Alberta as a location for providing your clients with ecotourism experiences (current, projected, preferred possibilities).

- locations in Alberta
- types of settings (wild, remote, close to highway, etc.)
- types of experiences provided
- length of stay in Alberta (current and/or preferred)
- length of ecotourism experience
- preferred season/potential in other seasons
- activities, if any, other than ecotourism related, in which your clients are interested in Alberta.

## **NTA Data Base Operators**

- The majority of motorcoach operators visit Calgary and the mountain park areas, while only a few specify Jasper and Edmonton. More specifically the indications are the following:
  - Calgary/mountain parks/Rockies (12)
  - Jasper/Edmonton/WEM (2)
- In terms of trip duration, the following were expressed:
  - two to four days (5)
  - 10 days (2)
  - 7 days (1)
- Most (5) indicated summer months, 1 indicated Sept.
- Specific activities or sites that were mentioned were; Stampede (3), gondola, sightseeing, walking, and shopping.



## **Specialty Tour Operators**

- The majority identify the mountain park areas, including Kananaskis and Waterton, and Calgary as primary areas of interest (19). Other areas mentioned more frequently include:
  - Edmonton (8)
  - Drumheller/badlands (5)
- Trip durations vary considerably and range as follows:
  - 2 to 5 days (9)
  - 5 to 8 days (6)
  - 2 weeks (2)
- Most are in the summer months ranging from May to Oct. (11), with the concentration in the June to Sept. range. Some mention year round (3) and winter ski activities (4).
- They provide a very broad range of activities in Alberta. The most frequently mentioned include:
  - sightseeing (4)
  - Calgary Stampede (3)
  - cycling (3)
  - hiking (3)
  - gondola (2)
  - golfing (2)
  - shopping (2)
  - trail riding (2)

## **Combined Results**

- The mountain park areas accessed through Calgary are where the majority of activities are concentrated for the operators that responded to the survey (31). Edmonton was identified less frequently (10). Drumheller and the Badlands are a relatively popular location with the specialty tour sample (5).
- The most common duration in Alberta is for the shorter 2 to 5 day trips (14). Longer trips were more common with the specialty operators.
- Most of the trips occur in the summer period; May to Oct. (17). A few specialty operators identify year round or the winter months (7).

- There are a wide range of activities in which they are involved; Calgary Stampede (6), gondola (4), sightseeing (5), shopping (3), cycling (3), and hiking/walking (4).
- **THE FOCUS OF EXPERIENCES IS CLEARLY ON THE MOUNTAIN AREAS FOR SHORTER DURATION TOURS (2 TO 5 DAYS) DURING THE SUMMER (LONGER AND/OR "OFF-SEASON" TOURS WERE MORE LIKELY TO BE PROVIDED BY SPECIALTY TOUR OPERATORS). THE FOCUS ON MOUNTAIN LOCATIONS MAY BE DUE TO A LACK OF AWARENESS ABOUT OPPORTUNITIES THAT EXIST ELSEWHERE. MORE AWARENESS OF OPPORTUNITIES, OTHER THAN MOUNTAIN, NEEDS TO BE PRESENTED, TO PROVIDE OPERATORS WITH A RANGE OF CHOICES.**

## **2.8 Purchase Specialty Ecotourism Experiences From Alberta Operators**

Question #7: Do you need to purchase specialty ecotourism experiences, from Alberta operators, for your clients in Alberta, or do you prefer to develop and offer your own?

### **NTA Data Base Operators**

- There is not much purchase of specialty services; only 3 say they do.
- Would consider if it was customized (3).

### **Specialty Tour Operators**

- The specialty tour operators are likely to purchase specialty services (14).
- Several mention they purchase only local guides (4).
- Several mention they provide only their own (4).

### **Combined Results**

- More of the specialty operators purchase services (14) than the motorcoach sample respondents (3).
- Motorcoach operators seem reluctant to purchase these services. This may be due to lack of knowledge, unknown quality, and language barrier.

THE REASONS FOR NOT PURCHASING MORE SERVICES APPEAR TO BE DUE TO A LACK OF KNOWLEDGE OF WHAT IS AVAILABLE, NEED FOR TRANSLATION, AND KNOWING THAT A QUALITY SERVICE IS BEING PURCHASED. IT IS POSSIBLE TO PROVIDE AN INDEX OF AVAILABLE SERVICES SCREENED FOR QUALITY CONTROL THAT WOULD BENEFIT INBOUND OPERATORS, ALBERTA BASED SERVICE PROVIDERS, AND TOURISTS.

## **2.9 Requirements for Information and Assistance on Travel In Alberta**

Question #8: Describe any types of assistance (information, service) market or product related that Alberta Economic Development and Tourism could provide you that would assist you with ecotourism related experiences in Alberta.

There is a very broad range of comments and suggestions made by both samples of tour operators. They basically provide a very large wish list of information and assistance requirements that, in many cases, appear to be very individualized. The most often mentioned theme is a need for information on infrastructure (e.g. accommodation) up-dates (6). The reader is referred to the appropriate section in the appendix to obtain the full scale of comments.



**APPENDIX A:**  
**INFORMATION REQUEST**



March 2, 1994

Mr. Fazer  
Frazer travel Tours  
Box 471  
Pascal, Saskatchewan



Dear Mr. Frazer:

Alberta Economic Development and Tourism have, in the last few years, undertaken a number of initiatives in the general area of ecotourism in Alberta, Canada. This has included several studies aimed at identifying the potential for ecotourism opportunities in the Province and assisting private sector operators provide ecotourism products and services in the province. Existing and on-going market research demonstrate the very strong consumer demand for adventure, nature and cultural tourism products.

One aspect which has emerged is that there is considerable interest on the part of tour operators and wholesalers in bringing visitors to Alberta to enjoy ecotourism related experiences, as either stand alone experiences or part of a larger package. Many of you have been asking for information related to markets and opportunities in Alberta in order to better plan your products and activities in the Province. Given that this is such a rapidly growing and emerging area of tourism, the level of information available for planning and marketing has not kept pace with need.

As part of on-going efforts to provide the types of information operators are requesting, Alberta Economic Development and Tourism are sponsoring a partial survey of tour operators and wholesalers in North America. The purpose of the survey is to determine the current and emerging operator demand for ecotourism in Alberta and what kinds of ecotourism products you are looking for. To assist with their investigations, Alberta Economic Development and Tourism have retained the firm of HLA Consultants.

Your firm has been selected as one of fifty firms in North America from which to obtain information. You were selected on the basis of information obtained from a variety of sources that identifies you as a company that is involved, or has demonstrated interest, in this area.

We attach a list of general information requirements we would like to discuss with you (note one of the questions deals with information or assistance you may not now have, but which you feel would be of use to you). We will call you within the next day or two to discuss this further.

All information you provide will be kept confidential. A summary of the composite results will be prepared. If you wish, the results will be made available to you by Alberta Economic Development and Tourism. We can discuss this when we contact you.

We thank you for your attention and cooperation and trust this may result in initiatives that will be of great mutual benefit.

Sincerely,  
HLA Consultants

Roger Lefrancois





**ALBERTA ECONOMIC DEVELOPMENT AND TOURISM  
TOUR OPERATOR INFORMATION REQUEST  
(FOR TELEPHONE DISCUSSION)**

1. Describe your company's activities/products in the area of ecotourism (tourism related to culture, nature, adventure). If possible, we would like to receive a brochure and other information you may have available on your company.
2. What types of ecotourism products are your customers interested in (this can be products you offer and/or others you know they are interested in)?
3. Describe the market characteristics of the clients who are interested in these types of tourism activities (ages, occupations, origins, etc.).
4. What are the components of an ecotourism "package" that are of most appeal to your ecotourism markets (i.e. those that will serve as primary attractions to your clients (resources, attractions, developments, activities, etc.)?
5. What are the product characteristics that are sought by you and your customers as part of the ecotourism experiences?
  - accommodation (types and level)
  - related amenities (e.g. food services, educational lectures, etc.)
  - programs (interpretive, educational programming)
  - guides (need, qualifications)
  - physical activities (types and levels)
6. Discuss your experiences and preferences with Alberta as a location for providing your clients with ecotourism experiences (current, projected, preferred possibilities).
  - locations in Alberta
  - types of settings (wild, remote, close to highway, etc.)
  - types of experiences provided
  - length of stay in Alberta (current and/or preferred)
  - length of ecotourism experience
  - preferred season/potential in other seasons
  - activities, if any, other than ecotourism related, in which your clients are interested in Alberta.
7. Do you need to purchase speciality ecotourism experiences, from Alberta operators, for your clients in Alberta, or do you prefer to develop and offer your own?
8. Describe any types of assistance (information, service) market or product related that Alberta Economic Development and Tourism could provide you that would assist you with ecotourism related experiences in Alberta.





**APPENDIX B:**  
**LIST OF SAMPLE FIRMS**



Martin von Neudegg  
Canadian Mountain Holidays Inc.  
Box 1660  
Banff, Alberta

Karen McNamee  
Certified Vacations  
110 East Broward Boulevard  
Fort Lauderdale, Florida

Tom Kominami  
Canada Expert Tours Ltd.  
1500, 1100 Melville Street  
Vancouver, B.C.

Philip Katz  
Americantours International  
9800 Sepulveda Boulevard  
Los Angeles, California

Hidi Nishi  
TPI Travel Canada Ltd.  
P.O. Box 49079  
2374 Four Bentall Centre  
Vancouver, B.C.

Nick Watanabe  
Nippon Express Travel U.S.A.  
595 Howe Street, Suite 904  
Vancouver, B.C.

Martin Littlejohn  
JTB International (Canada) Ltd.  
2300 - 1055 Dunsmuir Street  
Four Bentall Centre  
Vancouver, B.C.

Irma Flores  
American Express Destination Services  
195 Broadway, 19th Floor  
New York, New York

Lisa Tokunaga  
American Tourist Bureau  
6053 W. Century Blvd. Suite 720  
Los Angeles, California

Jeff Coffman  
Active Adventures Worldwide  
17229 Newhope Street Suite C  
Fountain Valley, CA

Kaz Sasaguchi  
Tokyu Tourist Corporation  
404-999 Canada Place  
Vancouver, B.C.

Karen Wright  
Go American Tours Inc.  
733 Third Avenue  
New York, New York

Tak Mizuma  
Nippon Travel Agency Canada Ltd.  
#2600 1075 W. Georgia Street  
Vancouver, B.C.

Adventure Travel International  
P.O. Box 665  
Manhattan, KS

Mary Jane Barnes  
Rocky Mountain Cycle Tours  
Box 1978-SI  
Canmore, Alberta

Helene Steiner  
Canadian Adventure Tours  
PO Box 929  
Whistler, B.C.

Cathy Harrison  
Knapsack Tours  
5961 Zinn Drive  
Oakland, CA

Dick Gottsegen  
Timberline Bicycle Tours  
7975 E. Harvard #J  
Denver, CO



Rick McMahan  
American Wilderness Experience  
PO Box 1486  
Boulder, CO

Bob Maniwa  
Vita Travel Canada  
404 - 999 Canada Place  
Vancouver, B.C.

Administration  
Gata Tours Inc.  
82 S. Bayles Avenue  
Port Washington, New York

Mirabelle Rohatzi  
American Adventures  
6762A Centinela Avenue  
Culver City, CA

Hwasui Chin  
Canadian Co Co Tours  
220 Bear Street  
Banff, Alberta

Sarah Henshall  
AAA World Travel Agency  
720 East Morehead  
Charlotte, NC

Masaaki Kawabata  
AK Travel Canada  
555 Burrard Street  
Vancouver, BC

Roland Neave  
Wells Gray Tours  
Kamloops, BC

Loni Feit  
American Ring Travel  
PO Box 800-250  
Santa Clarita, CA

Lori Williamson  
Saga Holidays  
120 Boylston Street  
Boxton, MA

Patricia Fike  
Kernville Tours Inc.  
PO Box 79  
Shreveport, LA

Jerome Sullivan  
Collette Travel Services  
162 Middle Street  
Pawtucket, Rhode Island

Chris Ryan  
Brennan Tours  
717 Joseph Vance Bldg.  
Seattle, WA

Lyn Phillips  
Pathway Tours Inc.  
829 Richmond Street  
London, Ontario

Roy Merkel  
White Star Tours Inc.  
26 East Lancaster Avenue  
Reading, PA

Jane Koll  
Firstline Tours Inc.  
2901 Metro Drive #220  
Bloomington, MN

Debbie Warrington  
DMC Corporation/Uniglobe Northstar  
312 Rock Street  
Little Rock, AR

Carla Anderson  
AAA Tavel Agency  
910 North 96 Street  
Omaha, NE

Camille Barkley  
Barkley Travel Service Inc.  
141 West Bankhead Street  
New Albany, MS

Stuart Weisberg  
One If By Land Tours, Inc.  
41-45 150 Street  
Flushing, NY

Mary Jane Hollenback  
Bixler Tours, Inc.  
Box 37  
Hiram, OH

Louise Keierleber  
Harmon Tours  
PO Box 7727  
Boise, ID

Carrie Hulbert  
Tourquest  
2606 Lindsay Street  
Regina, Sask.

Dave Freeze  
Worldwide Adventures  
210 - 1676 Duranleau St.  
Vancouver, BC

Claudette Poirier  
Canada Nature West  
898 W. 17 Avenue  
Vancouver, BC

Curtis Bereza  
Great Canadian Wilderness Tours  
1027 Davie Street  
Vancouver, BC

Dorothy Maitland  
Maitland Travel Service Inc.  
38 Second Street East  
Kalispell, Mt.

Peter Fahlgren  
The Great Canadian Travel Company  
54 Donald Street  
Winnipeg, Man.

Peter Louwerse  
Wild Goose Adventure Tours  
#502 207 West Hastings  
Vancouver, BC

Janice Walker  
The Travel Center  
1110 Washington Street  
Perry, GA

Maureen Johnson  
Westcan Treks  
8412 - 109 Street  
Edmonton, Alta

Karen Emrich  
Lambert's Tours & Travel  
57 South Oak Street  
Ventura, CA

Jocelyn Langh  
Kirby Tours  
2451 South Telegraph  
Dearborn, MI

Veda Norfolk  
Norfolk Tours  
424 Lovers Lane  
Baton Rouge, LA

Vilda Fletcher  
First American Tours  
303 E. Southern #107  
Mesa, AZ

Ida Papik  
Crawford Tours Inc.  
5511 Wm. Flynn Hwy.  
Gibsonia, PA

James Jim  
Creative Tours International  
2735 Main Street  
Vancouver, BC

Yukio Yamada  
Kintetsu Interational Express  
1030 West Georgia Street  
Vancouver, BC

Nancy Hicks  
Kruger Travel  
10310 West Markham, Suite 206  
Little Rock, AR

Harry Ellis  
Adventure Outdoors  
PO Box 4461  
Rolling Bay, WA

Terry Sandoval  
Mac's Travel Service Inc.  
18738 E. Amar Road  
Walnut, CA



**APPENDIX C:**  
**DETAILED SURVEY RESPONSES**

# **DETAILED SURVEY RESPONSES TOUR OPERATOR MARKET SURVEY ALBERTA ECOTOURISM EXPERIENCES**

A total of 57 tour operators and wholesalers in various Canadian and U.S. cities were contacted; interviews were completed with 35. For purposes of data summary, respondents were segmented into three categories: National Tourism Association members, specialty tour operators, and respondents who did not complete the information request as presented. The specialty category includes operators and wholesalers contacted from the 1993 Rendezvous Canada Directory of International Buyers, the Specialty Travel Index (Spring/Summer 1994 edition), and industry contacts the client and consultant were familiar with.

It was decided to contact only companies indicating Alberta as a travel destination. In some cases (10) the indications from the various indices proved to be wrong. A summary of relevant responses from this group is presented at the end of this appendix.

The information presented below can be a statement or indication from any one operator or from several. An indication of frequency accompanies items mentioned more than once.

## **1.0 NTA MOTOR COACH RESPONDENTS (N=12)**

### **1.1. Products in Area of Ecotourism**

Although very few NTA operators said they were offering "Ecotourism" products, most offered tours with some form of "nature" component, examples of which are described below. Tours packages often vary from year to year as new destinations are introduced; therefore, the tours listed below represent a sampling of this year's products. In addition to providing scheduled tours, many companies will customize packages for pre-formed groups. Specific responses to this information item include the following:

- Motor coach tours with nature viewing to various U.S. and Canadian destinations.
- Motor coach tours to state parks and urban centres. Short trips of 2-3 days are most successful.
- Tours to U.S. parks, Canadian Rockies, Maritimes and cruises to Alaska and New England - soft adventure.
- Motorcoach tours to Canadian Rockies, Via Rail to Vancouver, motor coach to Alaska.

- Fall foliage tours to Ozarks and many city tours in Arkansas - 1-3 day tours most popular.
- Short and extended sightseeing motorcoach tours all over North America - mainly for seniors.
- Motorcoach tours to U.S. National Parks, Mexico, Northern Canada, New England States and Maritimes, and U.S. Southwest - package changes every year.
- Alaska wild land tours, fall fiesta in New Mexico, Bayou tour, Oregon mountains and wetlands, U.S. National Parks, animal viewing in Yellowstone - biologist or historian escorts on some. New destinations picked each year and areas of interest incorporated into tours.
- Nature trips planned by a naturalist - canoe trips to Pennsylvania, wildflowers in Ohio, bird migration in Ontario, polar bear watching in Churchill, crane migration in Indiana, whale watching in Maritimes. Marketing products primarily through environmental and nature groups and doing well. Products vary annually.
- Tours for school groups with a strong nature and educational focus - maritime centres, Adirondack wilderness, Georgia swamps, museums and environmental centres, train trips - change programs annually.
- Heli-hiking and tours of Canadian Rockies. South America becoming a big destination with cultural experience in Brazil, Peru. Tours to Galapagos.
- Travel trend indicates that long or expensive trips are not selling well, because of economy.
- Tours of Amazon, Costa Rica, Mexican ruins, hiking in Peru, rafting in Cabo San Lucas, rafting in Colorado.

## **1.2 Other Ecotourism Products In Which Customers Have Expressed Interest**

- Products will change from year to year, based on what customers want (mentioned four times).
- Company generates client interest by planning and promoting new tours.
- Not sure (4).
- Will plan any trip client wants (2).
- More soft adventure - ie. float trips, museums. When hear about interesting sites will incorporate them into a tour.

## **1.3. Market Characteristics of Clients**

- 80-90% retired seniors, mostly females, from Mississippi, Tennessee, Alabama
- Over 60 years old, retired, from N. and S. Carolina, well travelled and time on hands.



- 60% adults over 50, 40% Elementary & high school students, from New York and Long Island.
- Seniors, mostly female, from Ohio.
- Retired seniors; active, wealthy, enjoy learning, mostly single ladies; from Idaho, Washington and Oregon.
- Over 55, retired and well travelled; from Texas, Louisiana, Arkansas.
- Short tours 55+, Long tours 65+; many widowed ladies from Ontario; mid to upper income.
- 90% seniors, retired, more females, from eastern U.S.
- Motorcoach tours mainly seniors from Florida, Tennessee, Texas. Cruises are family and business travellers.
- 80% over 65 years old; 70% female; from Minnesota, Wisconsin, Iowa.
- Retired seniors.
- 30-50s; mainly professionals from South America; like anything exotic.

#### **1.4 Package Components with Most Market Appeal**

This question refers to the components that are of most appeal, those that will serve as primary attractions to the clients (e.g. resources, attractions, developments, activities).

- Good service, attractions at destination, full day's activities.
- Overall experience - sightseeing and educational aspect.
- Hands on experience for students - have to compete with videos and computers.
- Good mix of attractions and activities - each day must offer something of interest.
- Scenic, outdoor destinations rather than cities.
- Good, clean accommodation, sites they have heard of, shopping, cruises, bingos and games, value very important.
- Destination in general (2).
- Activities and/or scenery at destination.
- Good tour escorts.
- Outdoors and a semi-rugged experience. Want unusual sites.

#### **1.5. Product Characteristics That Are Sought**

##### **1.5.1 Accommodation and Related Amenities**

- Mid range, with restaurant on site or next door; want continental breakfast included.

- Triple A - 3 star very important. Want restaurant on site or adjacent with baggage handling.
- Moderate to deluxe. Clients are very discerning and want quality. Restaurants on site or in area.
- Availability different in every area - will take what they can get. Prefer full service with food and lodging together. Box lunches on tour.
- 3 star or better. Want hotel close to evening activity even if have to take taxi. Restaurant on premises. Quality food.
- Upscale. 3-4 star where possible. Restaurant on site or adjacent. Baggage handling and smoking/non smoking rooms. Elevators.
- 2-3 star or 5 star with a deal. Prefer full service but will work with adjacent restaurants. Baggage handling needed.
- 3 star. Clean, comfortable, attractive. Baggage service and breakfast on site wanted.
- Moderate level. Want restaurant on site or will go to famous one.
- Triple A or 3 star. Restaurant on site with others available. Don't want to be isolated. Baggage handling, and good attitude toward groups.
- Nothing below 3 star. Restaurant on site or next door, or will include a highly recommended restaurant.
- Mid level price and quality. Restaurant on site and baggage handling.

### **1.5.2 Programs and Guides**

- Programming depends on tour - use local guides. Must be personable, informative and knowledgeable. Want recommendation or NTA affiliation.
- Programs are very important and included on most tours. Use escorts and step on guides. Must know region.
- Some educational programs included. Want members of NTA or Bus Association or will talk to regional bureau for recommendation. Must be qualified with a track record.
- Naturalist conducts tours and lectures. Also use local guides - preferably someone recommended.
- Programs not on every trip. Sometimes use guides - must be knowledgeable and congenial.
- Use their own tour guides and get local guides for specific sites. Must be well spoken, interesting and knowledgeable.
- Own tour escorts give commentary. In certain areas use local guides, especially major cities - get 3-4 hour professional tour. Will use only well known sight seeing organization.
- Sometimes escorts on board - also use step on guides. Must be knowledgeable and recommended by local operators.
- Provide own guides - educational programs at some cultural centres.

- All trips escorted and will hire step on guides. Must be knowledgeable, well dressed and personable.
- No programs, just use local step on guides. Will contact Chamber of Commerce for recommendation or NTA member.
- On some tours provide programs and also use step on guides. Must be highly recommended or from companies with good reputation.

### **1.5.3 Physical Activities**

- Varies with age of tour group.
- Usually low to moderate - some walking (8).
- Depends on type of tour - cover full spectrum and clients are matched with suitable one.
- Low level (3).

### **1.6 Experiences and Preferences in Alberta**

- Banff, Lake Louise, Calgary. Nature and city viewing. 2-3 days in summer.
- Motorcoach tour of Rockies. Walking and sightseeing. 10 days in summer.
- Banff, Lake Louise, Jasper, Calgary. Bus tour. 7 days in summer. Trend now is to shorter or less expensive trips.
- Banff, Jasper, Lake Louise. Bus tour and train trip. 10 days total - September.
- Banff, Lake Louise, Jasper, Calgary. City and mountain tour. 3-4 nights. Summer months.
- Calgary, Banff, Jasper. Sightseeing by motorcoach, train, shopping, gondola. 5 days July.
- Banff, Jasper, Hinton, Calgary, Edmonton. Mainly motorcoach sightseeing. 4 nights in July, August.
- Motorcoach of Rockies and Calgary Stampede. Mixed activities. 3 nights in summer.
- Motorcoach tours of Banff, Lake Louise, Radium, Columbia Icefields, Calgary. 4 nights in July. Sometimes do WEM. Jasper hard to get hotel bookings. May do Dinosaur Park this year.
- Bus tour of Rockies. 3-4 days in Fall. Not visiting Alberta this year.

### **1.7 Purchase of Specialty Ecotourism Experiences From Alberta Operators?**

- Selling other operators' tours only.
- Would consider buying package if standard is good and flexible - must be able to customize portions (2).
- Yes, already do (2).



- Primarily developing own packages, but would consider purchasing.
- No, do their own.
- Will use local operators only if in a bind - prefer control and cost of doing own.
- Will hire local guides (2).

## **1.8 Requirements for Assistance or Information on Travel in Alberta**

- Would like black and white photos of tour sites in Alberta to include in travel brochures. Wants additional information on Alberta sites for consideration in future packages.
- Will call when they need material - presently get much travel material from Canada and do not have room to store it all. When out of date, it gets thrown away (2).
- Wants familiarization trips for group leaders in travel business and think funding and planning assistance for fam. trips should be available.
- Prefers to receive all travel info including hotel, restaurants, sites, photos, etc. in one package, such as binder. Would like to receive travel material on Alberta.
- Would use more photos in their travel book if slides could be kept. Suggests Tourism people send a list of slides available for agency to select subject areas, then Tourism select and send best slides available. Can also work from quality postcard.
- Information on new hotels always important.
- Wants to know when new coop advertising funds are available.
- Satisfied with material received to date (2).
- Keep them informed of new places of interest and activities, especially soft adventure and for seniors (2).
- Would like to be on mailing list to receive information on sites and recommended guides.
- Basic travel info on Canada wanted for handout to many driving clients.

## **2.0 SPECIALTY TOUR OPERATOR RESPONDENTS (N=23)**

### **2.1 Products in Area of Ecotourism**

- Scheduled motorcoach tour of Canadian Rockies, B.C., Niagara Falls.
- Motorcoach tours of Rockies and U.S. National Parks.
- Hiking tours of Rockies and tours of Drumheller/Dinosaur Provincial Park.
- Wildflowers in Alberta, bird watching in Vancouver, Newfoundland, New Brunswick; flower viewing at Mt. Rainier and Olympic National Park.
- Hiking/skiing/camping in Rocky Mountains. Canoeing in Ontario.
- Ski trips to Rockies. Tours of national parks in U.S.
- Hiking, fishing, sightseeing in Canadian Rockies.
- Scheduled bus tours and fly/drives of western Canada. Adventure tours in U.S. and Canada. Tours of Grand Canyon and many U.S. destinations.
- Mini bus camping tours all over Alaska, Canada, U.S. and Mexico.
- Hiking, sightseeing, camping tours of Rockies.
- Whale watching in Newfoundland and Gaspé River rafting in Alberta and National Parks. Ecotours to Costa Rica and Galapagos.
- Specialize in car tours of national parks in North America.
- Motorcoach tours of Rockies, national parks, river rafting on Athabasca River, fishing Lake Minnewanka.
- Camping, wilderness trips to continental Rockies and Alaska, Hawaii and Mexico. Mostly horseback, rafting and hiking activities.
- Summer hiking trips in Canadian Rockies, Switzerland, Yellowstone, Yosemite, Vermont.
- Guided bicycling and hiking tours to western U.S. and Canada, Great Lakes and Maritimes.
- Cycling tours in Canadian Rockies, Hawaii and Europe.
- Offer tours at in all parts of the world for all physical levels in hiking, biking, skiing, rafting, scuba diving, safari.
- Heli skiing and heli hiking in southeast B.C.
- Motor coach tours of Rockies, B.C. and coastal motorcoach/ float plane tour, Queen Charlotte Islands. Cypress Hills & Writing on Stone Park tours.
- Soft adventure - motorcoach to Western Canada, educational tours (Smithsonian Odyssey Tours) all over world, rail tours, Rhodes Scholar N. American coach tours, Dinosaur Digs & Buffalo Bones in Rockies.
- Motorcoach tours to western Canada, Maritimes, and U.S. National Parks.
- Golfing, horseback and camping trips all over Canada and U.S. Northern Lights watching in Alaska, salmon fishing in Vancouver area.

## **2.2 Other Ecotourism Products In Which Customers Have Expressed Interest**

- Products are changed each year before customers ask for new areas. Many return clients.
- Some interest in short trips to grain farms, cattle ranches, potato farms.
- Considering iceberg and whale watching in Newfoundland and heli-hiking in Rockies.
- Want to add short (3-4 days) special interest tours for students in Japan, like Caribou watching in Northern Alberta and farm life experience.
- Trend in recent years is to smaller group size and more individual travel. Many Japanese take first trip as group tour and then will return to travel alone.
- Will plan any trip that is requested.
- Some interest in white water rafting.
- Trend in tours is to offer more outdoors components - clients want to experience nature first hand. Problem is finding specialized bilingual guides for Japanese clients.
- Some interest in heli-hiking in Bugaboos, iceberg and seal watching in Newfoundland and Labrador.
- May offer bird watching.
- Want to expand into Maritimes, Yukon, Northern B.C. and NWT - more remote, unusual places.
- Will add and delete activities/destinations each year as customers request. In last 3 years have added New Zealand, Australia and upgraded parts of Alaska, Costa Rica and Peru.
- Clients will contact specific specialty companies for different activities.
- Starting to offer more self-guided cycling packages -ie. partial service such as maps and bikes.
- Climbing and mountaineering packages have been requested.
- Client can already add on pre and post trip activities that interest them.
- Wants to plan tour of forestry trunk road in Alberta but no accommodation available.
- Already offer many activities in most parts of the world.
- Hunting is requested but it is the company's policy not to handle hunting trips.

## **2.3 Market Characteristics of Clients**

- 30-60 years old; mixed backgrounds; 70-80% from W. Europe.
- All ages from teens to retired; 100% from Japan.
- 18-75 year old; students in Winter, honeymooners in Spring, families in August. 100% from Japan.
- 40-60s; 80% females - usually housewives finished raising children; 100% from Japan. Very nature and conservation minded.
- Teens to retired; 90% from Japan and 10% Taiwan.



- 25-30 years old in Winter; 35-70 years old April-August. 100% from Japan.
- 30-50s; 90% from Germany.
- 20-60s; many exchange students and office workers; from Australia, Japan and Europe.
- 3 main groups: single working women in 20-30s; honeymooners; retired couples. 100% from Japan.
- Mostly 65+; wealthier and retired; well travelled and looking for unique areas; 50% from New England and remainder from other U.S.
- Main age group 35-40, then 25-35. Mostly office workers from Japan.
- 30-45 years old; majority from Japan and some S.E. Asia.
- 35-40 years old; mid to upper mid class; from east coast U.S., west coast U.S. and Cornbelt regions.
- 25-75 years old; many professionals and retired; 75% from California. Clients appreciate nature, are flexible and not materialistic.
- 25-55 years old; mostly working people from all over U.S. and Canada; generally active and athletic.
- 20-50s; professional, well educated, fairly affluent; couples and singles; 60% U.S. and 40% Canada.
- 25-60s; many professionals and executives from N.E. U.S. and California.
- 40-45 in winter, 50-55 in summer; professionals and businessmen; 55% from U.S. (mostly California, Colorado, New York, New Jersey), 40% Europe, 4% Canada.
- Active seniors 65+; retired from B.C. interior; many repeat customers.
- Seniors 60+; retired, middle class, male and female, from U.S., Canada and England.
- Over 60; mostly retired, 75% married couples; from U.S..

## **2.4 Package Components with Most Market Appeal**

- Price, value, diversity of destinations and ease of booking.
- Sightseeing in the Canadian Rockies and Niagara Falls - want to see sites they have heard of. Natural features important (2).
- Rocky Mountain destination. (2)
- Accessible viewing for wild flowers (can drive to subalpine level) and stable travel environment.
- Level of service by tour company and Japanese tour guide.
- Love of national parks - aware of nature and history and want to see places they have heard of.
- Outdoor part of tour; small group, community feeling; flexibility with optional activities; and lots of country seen.
- Natural attractions and places they have heard of - Rockies, Banff Springs Hotel. Time a problem with ecotourism travel - not fast paced and tends to need longer trip.

- Destination and activities.
- Clients plan own activities at their destinations.
- Natural beauty of destination.
- Want wilderness experience.
- Know destination they want and look for low cost tour. In Rockies, affordable day hikes with comfort at night.
- Aesthetic aspect of setting, plus routes, lodging and meals.
- Depends on destination - in Rockies, scenery and safe cycling on wide roads. In Europe, food, lodging, scenery, wine and exotic locale.
- Activity and destination combined.
- Types of activities and company reputation.
- Uniqueness of tour activities which they can't do on their own and good cost.
- Destinations and activities - want educational component and something different.
- Combination of destination and activities - offer deluxe product at good price.

## **2.5 Product Characteristics That Are Sought**

### **2.5.1 Accommodation and Related Amenities**

- Budget or deluxe depending on package. With deluxe want baggage handling and restaurant on site.
- Wide variety - use both basic and luxury.
- First class or best available - want restaurant on site or nearby, baggage handling and entertainment nearby.
- Want moderate level accommodation now, in past was deluxe. Want restaurant within walking distance and smoking section available.
- Use campgrounds only - not primitive camping. Buy and cook own food.
- Want standard rooms with restaurants on site or nearby. Baggage handling.
- Deluxe accommodation. Restaurant on site preferred with smoking section. Baggage handling.
- Look for mid to high quality in each area so can offer packages of different prices. Will go with what food amenities are available. Value important.
- Need all level of accommodation to meet demand - not just wealthy people travelling anymore. Food quality important; want breakfast on site but dinner and lunch away. Usually want baggage handling. Many Japanese are smokers.
- Log cabin style away from commercial areas. Prefer breakfast and supper on site. Want box lunch to take during day.
- Offer different priced packages therefore need economy to first class. Prefer restaurant on site and baggage handling but varies. (2)
- Want 4-5 star for most tours; will use dorms for students. Breakfast at the hotel with other meals away. Baggage handling.

- Standard rooms. Restaurant on site with good hospitality important.
- Mostly tent camping with some rustic lodges. Lodges require food on site, can be indoor or outdoor plumbing. Depends on what is available.
- Use lodges, Inns, motels, cabins - depends on what is affordable. Little choice of accommodation in Rockies. Mixed food needs - make own meals in some locations and get it provided at others.
- Want, intimate, comfortable settings with private bath and atmosphere. No upscale, massive hotels. Likes pool or hot tub, non smoking rooms, and restaurant on site. Willing to compromise on accommodation if route is exceptional.
- Varies with tour - upscale not available along Banff-Jasper route - food and lodging often rated low. Many places need upgrading. A negative for tourism in the area - accommodation very important. Want soundproof rooms, good bed and mattress, good shower, hot tub or sauna or steam bath, bar facilities, smoking/non smoking rooms.
- Inns and bed & breakfasts. Want comfortable, homey atmosphere. Prefer gourmet food, breakfast on site and baggage handling.
- Company owns and uses its own remote mountain lodges. Very upscale with jacuzzi, massage therapist, bar, chef, baker.
- Regular tours use 3-4 star, adventure take anything they can get. Want restaurant in walking distance, baggage handling, and picnic lunches on remote tours.
- First class and deluxe on most tours; university rooms on others. Dinner at hotel and outside for local flavour. Baggage handling.
- Deluxe or first class - depends on location. Prefer restaurant on site and baggage handling.

### **2.5.2 Programs and Guides**

- Tour guide/escort provides commentary. Also work with step-on guides as needed. Must be knowledgeable, personable and bi-lingual (Japanese) (3).
- Tours guides and step on guides used. Must be knowledgeable in area (2).
- Tour leader from Japan and a naturalist in Banff (usually ex park Warden). Will interview naturalist first.
- Provide own Japanese and Chinese speaking guides - no step ons (2).
- All tours escorted and use licensed guides when required in cities. Prefer German speaking guide recommended by local jurisdiction.
- Programs not big part of tours - guide gives commentary. No step ons.
- Use step on guides as needed - work with guiding company in Banff. Prefer bilingual, knowledgeable, personable guides with training in Japan.
- Programs and guides not offered.
- Programs important part of tours. Work with teachers, historians, glacial experts, etc. Must be in business for 10 years with proven track record.



- No specific programs but guides are well versed in many areas - only if customer is curious. Look for mature, well rounded, knowledgeable person, good with people, knows bikes, first aid training and bilingual an asset.
- No formal programs - guide explains highlights on bike tours, more interpretive on hiking tours.
- Use local guides at certain sites plus have tour guide.
- Education important but optional. Guides give info and client listens if they want. Work with outfitters.
- Employ fully certified mountain guides. Must be multilingual, wilderness and first aid, training etc. Very knowledgeable in geology, history, geography. Summer tours are very interpretive.
- Offer programs when have access to park naturalist or good step on. Has to know geography and history and talk up to 3 hours in entertaining fashion.
- Most tours include programs offered by tour managers, lecture leaders or step on guides. Will contract with a company used in past or want recommendation.
- Commentary is by escorts - no step on guides.

### **2.5.3 Physical Activities**

- Low level of activity - sightseeing with some walking (6).
- Low to moderate - hiking, horseback riding, rafting, skiing available as options.
- Moderate - activities differ in each area - cycling, canoeing, hiking, gondola, horseback riding (2).
- Varies, depending on what activities requested by clients.
- High level - skiing.
- Low to moderate - hiking, walking, skiing.
- 95% beginner level - horseback riding, rafting, hiking.
- Moderate level of hiking only.
- Moderate to advanced bike tours (50-60 miles per day) and hikes (8-12 miles per day).
- Moderate and advanced cycling trips available.
- Full range of many activities available from sedentary to advanced. Intermediate is most popular.
- Light to moderate - optional activities available for more active.
- Low activity level - walking (2).
- Low to advanced - summer hikes organized by ability level. Winter skiing advanced only.



## 2.6 Experiences and Preferences in Alberta

- Touring Rockies generally plus Calgary and Edmonton. Mostly motorcoach tours with sightseeing, golfing, gondola ride. 3-4 nights stay in Alberta. Tour June- September.
- Visit Jasper, Banff, Lake Louise. 2 nights. May through September.
- Tour Banff, Jasper, Lake Louise, Kananaskis. 2-3 nights. Mixed activities - boat ride, gondola, golf, horseback ride. Visit year round. Planning Drumheller/Badlands tour. Less interest in West Edmonton Mall - Mall of America has taken over.
- Banff, Jasper, Calgary, Edmonton, Drumheller, Dinosaur Park, Kananaskis. 2-3 nights. Mixed activities. May to September with some winter ski trips.
- Banff and Exshaw. Stay out of commercial areas. Mostly wild flower viewing. 1 week in Alberta. Late April to early August. May consider Moraine Lake, Larch Valley, Assiniboine, Kananaskis, and Waterton.
- Lake Louise, Banff, Jasper, Kananaskis, Drumheller. Scenic motorcoach tours and mixed activities. 2-3 days. Year-round with some winter skiing. Also visit Calgary Stampede and Edmonton K-Days, although not a stand alone draw.
- Calgary, Jasper, Lake Louise, Banff and Kananaskis. Winter ski trips. 4 days average stay.
- Banff, Jasper, Drumheller, Calgary, Edmonton. Mixed activities. 3-4 days. Year-round tours.
- Banff, Jasper, Lake Louise, Kananaskis. Scenic bus tours, shopping. 2 nights. May to September. Nothing planned for winter as consumer laws in Europe are very strict - an operator can be sued easily if they don't provide exactly what is advertised. Winter travel a bit riskier.
- Banff, Jasper, Lake Louise, Calgary, Waterton (new this year). Settings include remote, campground and townsite. Mixed urban and nature activities. 6 days average during May to September.
- Banff, Lake Louise, Jasper, Calgary, Edmonton. Calgary and Edmonton hard to sell in Japan - viewed as gateway to Rockies. Mostly mountain viewing activities. 3-4 nights, year-round. Have offered Waterton and Head Smashed In with little success - limited awareness of these sites in Japan.
- Jasper, Lake Louise, Banff, Calgary, Edmonton. Motorcoach tours with mixed activities. Sometimes do Calgary Stampede and WEM. 5-7 nights during May-October. Past winter ski tours didn't attract clients. Considering future train trip from Jasper to Prince Rupert.
- Individual packages to Banff, Jasper, Calgary, Badlands, Waterton. 2 week average stay. Client chooses season and activities.
- Banff, Lake Louise, Jasper, Calgary, Edmonton, Drumheller. City/mountain tours. 2-5 days. Mainly May to October with some winter ski tours.

- Banff, Canmore, Kananaskis, Bow Valley, Mt. Kidd, Baker Creek, Calgary. Mainly biking and hiking on dirt trails with optional activities such as gondola, train. 6 days. July-September. Customers also interested in mountaineering and canoeing.
- Banff, Lake Louise, Emerald Lake, Kananaskis. Heli hiking and biking on trails. Optional canoeing, fishing, guided walks. 6 days during June to September. Would like to see a bike trial from Lake Louise to Jasper on old road bed.
- Banff, Moraine Lake, Lake Louise, Jasper, Canmore, Kananaskis, Waterton. Hiking and biking in remote areas. 5-7 nights during late June to August. (This Denver operator says his 10 day Classic Canada tour was the first to sell out this year. 80% are repeat customers.) Fall trips in past have been cancelled because clients believe that winter comes early.
- Calgary, Banff, Lake Louise, Jasper, Mt. Robson, Canmore. Hiking and ranger talks only. September for 2 weeks - in Alberta for 7-8 days. Clients also interested in cycling - want nature experience.
- Heli-hiking and horseback riding in Banff National Park. Remote settings. 5 days in the summer. No winter activities planned.
- No activities in Alberta yet, but customers stay in Calgary overnight inbound and outbound to heli hiking and skiing trips in B.C.
- Cypress Hills, Kananaskis, Rocky Mountain House, Drumheller, Hwy 22, Jasper. Some Calgary and Edmonton tours as well. Remote and town settings. Motorcoach sightseeing. Up to 1 week during May, June, September, October. Interested in forestry trunk road tour but no accommodation nearby.
- Kananaskis, Banff, Lake Louise, Jasper, Drumheller, Fort McLeod, Badlands, Calgary. Sightseeing, dig site, gondola ride. 4-10 days in summer and winter. Last year started Xmas in Banff tours.
- Calgary, Banff, Lake Louise, Jasper. Motorcoach tours with sightseeing, shopping, evening activities. 3-4 nights during June to September. Some interest in WEM, Head Smashed In, Tyrell Museum, Calgary Stampede.

## **2.7 Purchase Specialty Tourism Experiences From Alberta Operators**

- No, prefer to offer own.
- No, client chooses and purchases own activities at destination.
- Will purchase local guide services.
- Yes, work closely with local operators, but limiting factor is ability to speak Japanese.
- Will purchase specific activities like horseback ride (4).
- Yes will purchase from local operators/specialty wholesalers (5).
- Yes, will purchase from local operators (4).
- Purchase accommodation and shuttle transportation only.
- Logistic support purchased - bus ride, lunches, escorts.
- Will purchase accommodation, meals and step on guides.

- Will purchase some programs and guide services.
- No need to purchase.

## **2.8 Requirements for Assistance or Information on Travel in Alberta.**

- Would like road maps, new infrastructure updates, promotional materials for Japanese market.
- Wants Tourism people available at Rendezvous Canada and trade shows. Would like to receive brief (max. 2 pages) factual newsletter on latest infrastructure changes/new sites at key destination points. Leave out promotional aspect, as agents already know beauty of Parks. No time for video.
- In order to discover areas suitable for study of wildflower, would like destination studies and fam tours. Would appreciate fam tour accommodation planned (not paid) for. Would like the Department's cooperation generally - ie. occasional help getting a better rate at hotels.
- Would like to see improved service and attitude at some hotels. ie. poor service, often overbook even with written confirmation.
- Would like support in bringing Japanese tour guides to work here. Hard to find qualified Canadians as most prefer to work with larger companies.
- Wants print material on local attractions and activities, as expanding optional excursions in this area. Also, information on new hotel property in Rockies. Has difficulty finding hotel space in Banff and Jasper in August and could be sending more tours there.
- Good relationship with Tourism people - they should consider Native culture program for student travel markets. Also, process for marketing funding assistance should be more streamlined.
- Tourism people doing excellent job already and material is very easy to read.
- Would like information on outdoor activities in mountains and cultural activities in Edmonton and Calgary.
- Wants list of pre- and post-trip lodging in Banff and Calgary in the budget to mid-price range.
- Schedules of ranger talks and activities in Banff, Jasper, Lake Louise - could use this info in advance of planning trips. Could also use an Alberta hiker who knows area to assist on one of her trips. Toilet facilities at Bow Summit and Athabasca are very inadequate - dirty, smelly and long line ups.
- Always looking for new info on existing or new areas so they can expand offerings. Do very much repeat business therefore new packages are very important. Would also like to see more bike trails similar to one from Banff to Lake Louise with lodging available about every 50-60 miles.



- Very much need a connector bike route out of Banff to Bow Valley Parkway - very dangerous 7 km. stretch on Trans Canada. Need to recognize big trends in adventure tourism and target/fund this area. Should have a bike trail to Jasper from Lake Louise (an old road bed already exists) - "droves of people would use this". The bulk of the market is for trail cycling rather than off trail. We should be leaders like in Moab, Utah. Standards of summer staff in mountains needs to be greatly improved - consider establishing a hotel training centre in Bow Valley.
- Alberta Tourism should have local presence in southern California, which is a huge market. Consider sub-contracting such a service to a local marketing/adventure company. (He would consider adding this function to his business for a commission.) Also suggests adding half day VIA rail trips into scenic areas or historic sites to be used as optional activity on tours.
- Good support from Alberta Tourism in past. Lately has noticed decrease in funding support for marketing for special promotions - seems like more is spent on European market. We should not forget about our primary U.S. market.
- Alberta Tourism needs to provide more recognition for big spending firms that operate here.
- Does lots of repeat business so would like suggestions of other trip routes for motorcoach tours. Would like to receive more print material of sites off the beaten track. Thinks the Alberta Group Tour Manual should be done annually - last one was 1990-92. Suggests that guest ranches/lodges could be more receptive to groups as planners can be very flexible when planning a trip early in the year and can often fill a gap in lodge's schedule, even though group may not want to purchase all of lodge's activities. Would like to see Park Rangers available after Labour Day in Cypress Hills Park, Cochrane Ranch, and Crowsnest Pass to meet groups on a pre-arranged basis. Group would be willing to pay a fee.
- New ideas are always important - sites, activities, festivals. For example, New Year's in Banff - want info on what events should be offered. Or send names of local operators with information. The more ideas they get the more travellers they can send.

### **3.0 Summary of Comments from Respondents Not Touring Alberta**

A total of 10 reported that they either had never toured Alberta or had not visited the province in several years. Those presently not visiting Alberta cited distance and/or lack of customer interest as factors; however, Alberta trips will be planned if requested by pre-formed groups. Specific comments include:

- Arkansas agent said the bulk of their tours are 5 nights or less and an Alberta tour would exceed this. Too far for present demand, but will plan if requested by a pre-formed group.



- California agent said haven't done Alberta tours since before 1992 and no plans to re-visit because of lack of client interest. Alaska and Hawaii seem to be hot spots this year. Will offer if requested by clients.
- Georgia agent said no scheduled Alberta tours in several years, but will plan one in future if demand is there.
- Missouri agent said her company is not conducting any tours to western U.S. or Canadian destinations, but will rent motorcoaches to parties interested in these destinations.
- Louisiana agent said last Alberta tour was 10 years ago. One was offered last year but cancelled because of lack of interest. Clients don't want to spend much money now so main tour demand is for 2-3 day type. Also, Alberta is not advertised much in her area and customers may not be familiar with this destination - suggests more advertising. Clients can be very "fickle" in their choices; ie. Hawaii used to be very popular.
- Pennsylvania agent said they deal with mostly student groups on 2-5 day tours. Time is limited and Alberta is too far. However, this destination would be planned for any group requesting it.
- Arizona agent said Alberta is not a tour destination they offer. Thought it was listed as such in the NTA directory because it may be featured as a side trip from a west coast cruise they offer. She had no knowledge of it. Their main product is music festival tours for school groups.
- Two agents said they are not offering any tours anymore.
- Edmonton agent said her company's tours are all outside of Canada.

#### **4.0 Comments from Contacts who Refused to Respond**

- Montana agent had no time to answer questions but said that GST is killing tourism in Canada, even with favourable exchange rate. She and clients find it too costly and are doing no tours of Canada until things change. One exception is a day trip to Vancouver from Seattle.
- B.C. operator did not participate in survey as a form of protest against very unreasonable tour bus licensing requirements in Alberta and most Canadian provinces. He is presently not doing any business in Alberta (and he could be doing a lot) because of restrictive licensing. For example, he is not allowed to pick up and drop off customers at Calgary airport. The industry is very protected. Brewster and Greyhound seem to dominate market and influence setting of unreasonable guidelines. 75% of his business is European clients with trips starting and ending in Los Angeles. 25% B.C. customers. His 24 day tours used to spend 15 days in Canada, but now he only spends 5 days in Canada because of bus travel restrictions. Many companies are moving to U.S. now because it is easier to operate out of there and to tour Canada from

there. We need an open market where Canadian operators can offer what they want. He would like to find an organization that would fund a court battle to challenge these unconstitutional barriers.

- Manitoba operator was willing to participate in survey if he was paid a consulting fee. He has developed considerable expertise in ecotourism over the years and considers himself to be a consultant in this area.

**APPENDIX: D**

**ACCOMMODATION PREFERENCES  
OF SELECTED  
SPECIALTY TOUR OPERATORS**



## **ACCOMMODATION PREFERENCES OF SELECTED SPECIALTY TOUR OPERATORS**

The responses of tour operators who provided ecotourism related products, rather than a mixture of products (selected primarily from the Specialty Travel Index), were reviewed to summarize their stated accommodation preferences. Out of the nine, there appear to be four general categories of accommodation responses.

- 1) Camping
- 2) Will take what they can get in an area - destination is most important. (Supply driven)
- 3) Comfortable and clean Inn, Lodge or Cabin with dining room on site or nearby and basic amenities such as hot and cold running water.
- 4) Upscale lodge with gourmet foods and hot tub, bar, chef, etc. (Demand driven)

The nine operator responses are summarized below, by main type of ecotourism activity and accommodation preferences associated with each.

- 1) Wild Flower and Bird Watching in Canada and U.S. - want log cabin style lodging, not deluxe, away from commercial settings, with restaurant on site.
- 2) Varied Soft Adventure (Whale watching, river rafting) and Ecotourism in Galapagos and Costa Rica - Want best available accommodation in area, with a restaurant. Will take first class if available.
- 3) Heli Hiking and Heli Skiing in B.C. - Stay in very upscale, remote mountain lodges with baker, chef, bar, jacuzzi, massage therapist.
- 4) Varied Adventure & Nature Tours in B.C. and Alberta - For adventure tours will take what they can get. Prefer restaurant within walking distance. For regular tours, prefer 3-4 star or Triple A accommodation.
- 5) Wilderness horseback, rafting, hiking in Continental Rockies - Some wilderness camping. Some Rustic lodge or motel - No resorts wanted. Require food on site. For other amenities, they will take what they can get, ie. indoor or outdoor plumbing.
- 6) Day Hiking in Mountains & National Parks of North America and Europe - Want what is affordable, whether that is a lodge, inn, motel, cabin or dormitory. Will cook in or eat out.
- 7) Bicycle & Hiking Tours in Canada and U.S. - Want clean, comfortable, intimate setting with private bath - usually a lodge. No hotels or youth hostels. Prefer a restaurant and hot pool or hot tub on site.
- 8) Cycling Tours in Canadian Rockies and Europe - Some tours camp. Others prefer upscale accommodation, but will take 2 Star if only that is available. Want restaurant on site or within walking distance, soundproof rooms, good beds, hot water, good shower, bar, hot tub or sauna or steambath, non-smoking facilities.



- 9) Hiking, Biking, Skiing, Rafting, Scuba, Safari Trips Worldwide - Hikers usually camp. Rest mostly want homey, comfortable Inns or Bed & Breakfast. Upscale clientele - prefer gourmet food with breakfast on site.

Since this was not a quantitative study, it is impossible to quantify the demand for each type of accommodation. It is apparent that the accommodation demand from this market is varied and the need exists for all types of accommodation. For some travellers, the destination with associated nature/adventure experience, are paramount and they will take whatever lodging they can get. For others, the entire package is important and top notch food and accommodation is critical.

The difficulty is in matching the preferred accommodation product with the market. One can assume that the calibre of the natural resource, the length of the tourist season and the potential market draw are important factors in such a decision, i.e. upscale accommodation would not be viable in an area with very limited market appeal. In general, it seems safe to assume that the greatest demand is for mid-level type of accommodation - clean, comfortable lodges, cabins or inns with basic tourist amenities, like good food and running water. Primitive/rustic accommodation is desired by relatively few travellers, while very upscale lodging is also in limited demand due to affordability.







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